NEBRASKA VOCATIONAL REHABILITATION SERVICES
BENEFITS ORIENTATION CHECKLIST

BENEFICIARY INFORMATION

Beneficiary Name:	Date of BPQY:
SSN:	Signed SSA Consent form(s) on file: *Yes No* *Consent signatures are valid for a period of 6 months*
Guardian/Payee:	Marital Status: Number of Dependents:

CURRENT BENEFITS RECEIVED

- ☐ Social Security Disablility Insurance (SSDI)
- ☐ Childhood Disability Benefit (CDB)
- ☐ Disabled Widow(er) Benefit (DWB)
- ☐ Auxiliary Benefits *(applicable to children)*
- ☐ Medicare: Part(s) A_____, B_____, D_____
  Check all that apply
- ☐ Medicare Advantage
- ☐ Supplemental Security Income (SSI)
- ☐ Medicaid

- ☐ Medicaid Waiver
- ☐ AABD Cash Payment
- ☐ TANF/ADC
- ☐ Food Stamps/SNAP
- ☐ Subsidized Housing
- ☐ Energy Assistance
- ☐ Telephone Assistance Program

- ☐ Veterans Benefits
- ☐ Workers' Compensation
- ☐ Unemployment Insurance
- ☐ Private Disability Payments
- ☐ Other Health Insurance
  COBRA, Employer or Spousal Employer coverage, etc.. List here:
- ☐ Other

EMPLOYMENT

- ☐ Earned Income (check if employed)
  - ↳ Amount _____ per   week   month   year
- ☐ Self-Employed
  - ↳ Amount _____ per   month   year (NESE)

If employed, does the individual require:
- ☐ Workplace Personal Assistance Services
- ☐ Specialized or Modified Transportation Needs
- ☐ Employment Supports (job coach, extra supervision, etc…)

SSA WORK INCENTIVES

TITLE II (SSDI/CDB/DWB)	**TITLE XVI (SSI)**
Most commonly used: Trial Work Period (TWP) ↳ Months Used: _____ Extended Period of Eligibility (EPE) ↳ Start Date: _____ ↳ End Date: _____ Impairment Related Work Expense (IRWE) Also includes: Subsidy & Special Conditions, Unsuccessful Work Attempt, Plan to Achieve Self-Support (PASS)∗, Extended Medicare (ExM), Expedited Reinstatement of Benefits (ExR), Section 301, Ticket to Work ∗ A SSI incentive that can also be available to a Title II beneficiary.	Most commonly used: Earned Income Exclusion (- $20 GIE & - $65 EIE) Continuation of Medicaid through 1619(b) Student Earned Income Exclusion (SEIE) Impairment Related Work Expense (IRWE) Also includes: Plan to Achieve Self-Support (PASS), Blind Work Expenses (BWE), Property Essential for Self- Support (PESS), Expedited Reinstatement of Benefits (ExR), Section 301, Ticket to Work

_____ VR Benefits Specialist Date	Pre-Employment Plan Action: ☐ Orientation Completed ☐ Referred to NWII
_____ VR Benefits Specialist Date	Post-Employment Plan Action: ☐ Orientation Reviewed ☐ Referred to NWII

- OVER -

NOTES/COMMENTS:

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